



Filing ID #10021114

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Daniel Arrigg Koh
Status: Congressional Candidate
State/District: MA03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 07/28/2018
Period Covered: 01/01/2017– 06/30/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Savings & Checking Account [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Betterment 401K ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment 401K ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment 401K ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment 401K ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment 401K ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment 401K ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Continental Properties, Ltd. ⇒ Springs at Gulf Coast [RE]	SP	\$50,001 - \$100,000	None		
Continental Properties, Ltd. ⇒ Springs at Tradition [RE]	SP	\$15,001 - \$50,000	None		
Schwab Investment Account 1 ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ Charles Schwab Bank Sweep [BA]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ Chicago IL PK DIST 5% [GS]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Chicago IL TRANS 5% [GS]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Cypress Fairbanks T 5% [GS]	SP	None	Interest	None	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Facebook, Inc. - Class A (FB) [ST]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ Ford Motor Company (F) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Franklin OH Conv FA 4% [GS]	SP	None	Interest	None	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Grant Park Multi Alt Strategy CL I (GPAIX) [MF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ Guam Gov Business, 5% [GS]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	None
DESCRIPTION: Due 11/15/19					
Schwab Investment Account 1 ⇒ Invesco S&P Small Finan Port ETF (PSCF) [EF]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Formerly known as Powershares S&P Small Finan Port ETF (PSCF)					
Schwab Investment Account 1 ⇒ Johnson Controls International plc Ordinary Share (JCI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Investment Account 1 ⇒ Las Vegas VY NV WTR 5% [GS]	SP	None	Interest	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Account 1 ⇒ LJM Preservation and Growth I (LJMIX) [MF]	SP	None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Schwab Investment Account 1 ⇒ Matthews Asia Innovators (MATFX) [MF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ Met WA A DC ARPT 5% [GS]	SP	None	Interest	None	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Michigan Fin Auth, 5% [GS] DESCRIPTION: Due 01/01/20	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ New Alternatives (NALFX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Schwab Investment Account 1 ⇒ New Jersey Transit 5% [GS] DESCRIPTION: Due 06/15/20	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
Schwab Investment Account 1 ⇒ New Jersey Transit 5% [GS]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Account 1 ⇒ Oakmark Int'l Fund Inv (OAKIX) [MF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 1 ⇒ Potash Corp SAS 3.25% [CS] DESCRIPTION: Corporate Bond	SP	None	Interest	None	\$201 - \$1,000
Schwab Investment Account 1 ⇒ Qualcomm Inc., 2.25% [CS] DESCRIPTION: Corporate Bond, Due 05/20/20	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	None
Schwab Investment Account 1 ⇒ TN HSG DEV AGCY 3.8% [GS]	SP	None	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Account 1 ⇒ Vaneck Vectors Morningstar Wide Moat ETF (MOAT) [EF]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Investment Account 1 ⇒ Vanguard Small Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 2 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 2 ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Account 2 ⇒ BP p.l.c. (BP) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Investment Account 2 ⇒ Center Coast MLP Focus Fund Inst (CCCNX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Account 2 ⇒ Charles Schwab Sweep [BA]	SP	\$1 - \$1,000	None		
Schwab Investment Account 2 ⇒ Columbia Contrarian Core Fund CL A (LCCAX) [MF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 2 ⇒ First Eagle Global Fund CL A (SGENX) [MF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 2 ⇒ Global Cord Blood Corporation (CO) [ST]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Formerly known as China Cord Blood Corporation (CO)					
Schwab Investment Account 2 ⇒ Grant Park Multi Alt Strategy CL I (GPAIX) [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Schwab Investment Account 2 ⇒ Invesco FTSE RAFI US 1000 ETF (PRF) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Formerly known as Powershares FTSE RAFI US 1000 Portfolio (PRF)					
Schwab Investment Account 2 ⇒ New Alternatives Fund Inc. (NALFX) [MF]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 2 ⇒ Nutrien Ltd. Common Shares (NTR) [ST]	SP	\$1,001 - \$15,000	None		
Schwab Investment Account 2 ⇒ Potash Corporation of Saskatchewan Inc. (POT)	SP	None	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
DESCRIPTION: Stock merger with Nutrien Ltd (NTR)					
Schwab IRA ⇒ Baron Partners Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Hancock Horizon Burkenroad Sm Cap Inst [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Hennessy Focus Fd Inv Cl [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Hennessy Gas Utility Index Fd Inv Cl [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ International Business Machines Corporation (IBM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Invesco S&P SmallCap Financials ETF (PSCF) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Formerly known as PowerShares S&P SmallCap Financials Portfolio (PSCF)					
Schwab IRA ⇒ Wasatch Core Growth FD Inv [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ Vaneck Vectors Morningstar Wide Moat ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
TD Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Checking & Savings Account					
U.S. Trust - Investment account ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200
U.S. Trust - Investment account ⇒ Bank of America - Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
U.S. Trust - Investment account ⇒ Columbia Global Technology Growth Fund (CMTFX) [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
U.S. Trust - Investment account ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
U.S. Trust - Investment account ⇒ iShares MSCI EAFE ETF (EFA) [ST]		None	Dividends	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ iShares MSCI Emerging Index Fund (EEM) [ST]		None	Capital Gains	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ iShares PHLX SOX Semiconductor Sector Index Fund (SOXX) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
U.S. Trust - Investment account ⇒ iShares Select Dividend ETF (DVY) [ST]		None	Dividends	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ iShares TIPS Bond ETF (TIP) [ST]		None	Dividends	None	\$1 - \$200
U.S. Trust - Investment account ⇒ PAX World Global Environment Markets (PGINX) [MF]		\$1,001 - \$15,000	None		
U.S. Trust - Investment account ⇒ Select Sector Financial (XLF) [EF]		None	Dividends	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ SPDR S&P 500 (SPY) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ SPDR Select Sector Fund - Technology (XLK) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
U.S. Trust - Investment account ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ TIAA-CREF Social Choice Bond Fund Instl CL (TSBIX) [MF]		\$1,001 - \$15,000	None		
U.S. Trust - Investment account ⇒ Vanguard Large-Cap ETF (VV) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
U.S. Trust - Investment account ⇒		None	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Mid-Cap ETF (VO) [ST]					
U.S. Trust - Investment account ⇒ Vanguard REIT ETF (VNQ) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
U.S. Trust - Investment account ⇒ Vanguard Small-Cap ETF (VB) [ST]		None	Dividends	None	\$1 - \$200
U.S. Trust - Investment account ⇒ Wal-Mart Stores, Inc. (WMT) [ST]		None	Capital Gains	None	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Abbey Capital Futures Strategy (ABYIX) [MF]		\$15,001 - \$50,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Amazon.com, Inc. (AMZN) [ST]		\$50,001 - \$100,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Boston Partners Long/Short (BPIRX) [MF]		\$15,001 - \$50,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Broadcom Limited - Ordinary Shares (AVGO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Check Point Software Technologies Ltd. - Ordinary Shares (CHKP) [ST]		\$15,001 - \$50,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Columbia Global Technology (CMTFX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Facebook, Inc. - Class A (FB) [ST]		\$15,001 - \$50,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Federated Gov't Obligs Fund [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1 - \$200
U.S. Trust - Trust DTD 12/19/1997 ⇒ First Trust DJ Internet Index Fund (FDN) [ST]		None	Capital Gains	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [ST]		None	Dividends	None	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares MSCI EAFE ETF (EFA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares MSCI Emerging Index Fund (EEM) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares Nasdaq Biotechnology Index Fund (IBB) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares PHLX SOX Semiconductor Sector Index Fund (SOXX) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares Select Dividend ETF (DVY) [ST]		None	Dividends	None	\$1,001 - \$2,500
U.S. Trust - Trust DTD 12/19/1997 ⇒ iShares TIPS Bond ETF (TIP) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
U.S. Trust - Trust DTD 12/19/1997 ⇒ JP Morgan US Large Cap Core Plus (JLPSX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Oppenheimer International Growth Fund (OIGIX) [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Permanent Portfolio (PRPFX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Pimco Total Return Fund (PTTRX) [MF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ SPDR MidCap Trust Series I (MDY) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
U.S. Trust - Trust DTD 12/19/1997 ⇒ SPDR S&P 500 (SPY) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
U.S. Trust - Trust DTD 12/19/1997 ⇒ SPDR Select Sector Fund - Technology (XLK) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Tencent Holdings LTD (700 HK) [OT] DESCRIPTION: Publicly traded stock		\$15,001 - \$50,000	None		
U.S. Trust - Trust DTD 12/19/1997 ⇒ Thornburg International Value Fund CL I (TGVAX) [MF]		None	Dividends	None	\$1 - \$200
U.S. Trust - Trust DTD 12/19/1997 ⇒ TIAA-CREF Social Choice Bond Fund Instl CL (TSBIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
U.S. Trust - Trust DTD 12/19/1997 ⇒ Vanguard Large-Cap ETF (VV) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
U.S. Trust - Trust DTD 12/19/1997 ⇒ Vanguard REIT ETF (VNQ) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
U.S. Trust IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Bank of America Money Market [BA]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Financial Select Sector SPDR Fund (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
U.S. Trust IRA ⇒ iShares IBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ iShares Select Dividend ETF (DIVY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ iShares Tips Bond ETF (TIP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ PAX World Global Environmental Markets Fund (PGINX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Permanent Portfolio (PRPFX) [HE]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ PHLX Semiconductor Sector (SOXX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ SPDR S&P Biotech ETF (XBI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ SPDR S&P MidCap 400 ETF (MDY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Technology Select Sector SPDR Fund (XLK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ TIAA-CREF Social Choice Bond Fund (TSBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Vanguard Large Cap ETF (VV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Vanguard REIT ETF (VNQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust IRA ⇒ Vanguard Small Cap ETF (VB) [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
U.S. Trust Roth IRA ⇒ Bank of America Money Market [BA]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ iShares Core S&P Small Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ iShares IBoxx & Investment Grade Corporate Bond ETF (LQD) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ PAX World Global Environmental Markets Fund (PGINX) [MF]		\$1 - \$1,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ PowerShares FTSE Rafi (PRF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ SPDR S&P 500 ETF (SPY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ SPDR S&P MidCap 400 ETF (MDY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ Technology Select Sector SPDR Fund (XLK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ TIAA-CREF Social Choice Bond Fund Instl Class (TSBIX) [MF]		\$1 - \$1,000	Tax-Deferred		
U.S. Trust Roth IRA ⇒ Vanguard REIT ETF (VNQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Catalant Technologies, Inc.	Spouse Salary	N/A	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Wilmer Cutler	Spouse Salary	N/A	N/A
City of Boston	Salary	N/A	\$111,398.49

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Betterment 401K (Owner: SP)
- Continental Properties, Ltd. (Owner: SP)
LOCATION: US
- Schwab Investment Account 1 (Owner: SP)
LOCATION: US
- Schwab Investment Account 2 (Owner: SP)
LOCATION: US
- Schwab IRA (Owner: SP)
- Schwab Roth IRA (Owner: SP)
- U.S. Trust - Investment account
LOCATION: US
- U.S. Trust - Trust DTD 12/19/1997
- U.S. Trust IRA
- U.S. Trust Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☒ Yes ☐ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Daniel Arrigg Koh , 07/28/2018